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Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Case Lookup

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Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Case Lookup course.

As a reminder, you may view the slide number you are on by clicking on the moving cursor.

Additionally, you can view the narration by clicking the Closed Captioning [CC] button in the lower right hand corner of the screen.

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Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link:

<http://www.cms.gov/WorkersCompAgencyServices/>.

Slide notes

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Course Overview

- WCMSAP Case Lookup Feature
 - Viewing a WCMSA Case
 - Viewing a Work-In-Progress (WIP) Case
 - Submit Request to CMS to re-review a case

**Slide notes**

This course explains the WCMSAP Case Lookup feature which gives WCMSAP users the ability to view a previously submitted Workers' Compensation Medicare Set-Aside (WCMSA) case or a work-in-progress (WIP) case

that was submitted/entered through the WCMSAP Web portal. This course also explains how to submit a request to CMS to re-review a case.

For more information on these user roles, please see the "WCMSAP Basic Functions for Account Managers" and/or the "WCMSAP Basic Functions for Account Designees" CBTs.

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WCMSAP

Users will either be an Account Manager or an Account Designee

Self submitters are their own Account Managers

Corporate or Representative Submitters will select their Account Manager who will choose/invite Account Designees

Slide notes

As a WCMSAP user you will either be an Account Manager or an Account Designee. If you are a self-submitter, you are the Account Manager and will not have any Account Designees.

If you are a corporate or representative submitter you will select your Account Manager who in turn will choose and invite Account Designees.

A user's role determines what functionality they will have access to.

For more information on these user roles, please see the "WCMSAP Basic Functions for Account Managers" and/or the "WCMSAP Basic Functions for Account Designees" CBTs.

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The screenshot shows the WCMSAP home page. At the top left is the CMS logo with the text "CENTERS for MEDICARE & MEDICAID SERVICES". To its right is the title "Workers' Compensation Set-Aside Web Portal" and a COB logo. Below the title is a blue navigation bar with links: "About This Site", "CMS Links", "How To...", "Reference Materials", and "Contact Us". The main content area on the left is titled "WCMSAP" and contains a paragraph explaining the site's purpose: "The WCMSAP provides an interface for entry of Workers' Compensation Medicare Set-Aside (WCMSA) proposals. You may use this site to enter the case information directly. The site also provides the ability to track submitted cases and the statuses without inquiry to COBC or CMS. Case Lookup and View Alert functions are also available. Click the desired link below to perform that function." Below this paragraph is another paragraph: "You may modify Account Settings by clicking the appropriate link under the Account Settings list." Underneath is a section titled "I'd like to..." with three links: "Create a New Case", "Case Lookup" (which is highlighted with a yellow box), and "View Alerts". On the right side of the page, there are two vertical boxes. The top one is titled "QUICK HELP" and contains a link "Help About This Page". The bottom one is titled "Account Settings" and contains five links: "Update Personal Information", "Update Account Information", "Designee Maintenance", "View Account Activity", and "Change Password".

Slide notes

After a successful login, the WCMSAP Home page (shown here) is the first page displayed.

To access WCMSA cases that were submitted through the Web portal and are associated to your ID, click Case Lookup.

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The screenshot shows the 'Case Lookup' page of the 'Workers' Compensation Set-Aside Web Portal'. The page header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main heading is 'Case Lookup'. Below it, a paragraph explains that users can access Workers' Compensation Medicare Set-Aside (WCMSA) cases by Login ID using various search criteria. A 'QUICK HELP' button with a link 'Help About This Page' is on the right. The search criteria section includes three radio buttons: 'All Cases (Both submitted and WIP cases)' (selected), 'Submitted Cases Only', and 'WIP Cases Only'. Below these are input fields for 'Case Control Number', 'Health Insurance Claim Number (HICN)', and 'SSN' (Social Security Number), separated by 'OR'. There are also date range selectors for 'Case Creation Date Range' and 'Case Submission Date Range', each with 'From Date' and 'To Date' fields in MM/DD/CCYY format. At the bottom are 'Clear', 'Cancel', and 'Search' buttons.

Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and are associated with your Login ID using various search criteria. Enter the search criteria in the provided fields and click 'Search.' Selecting 'Cancel' will return you to the Home page.

☒ All Cases (Both submitted and WIP cases)
☐ Submitted Cases Only
☐ WIP Cases Only

Case Control Number:
Health Insurance Claim Number (HICN): OR SSN: --

Case Creation Date Range:
From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Case Submission Date Range:
From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Slide notes

The Case Lookup screen will display. You may access WCMSA cases that are associated with your Login ID using various user-specified criteria.

Case listings may be requested for all cases (both submitted cases and work-in-progress cases), submitted cases only, or work-in-progress cases only.

The Web Portal also enables you to search cases by: Case Control Number, Health Insurance Claim Number (HICN), or Social Security Number (SSN).

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Workers' Compensation Set-Aside Web Portal

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Case Lookup

You can access Workers' Compensation Medicare Set-Aside (WCMSA) cases that have been submitted through the Web portal and enter the search criteria in the search criteria page.

☒ All Cases
☐ Submitted
☐ WIP Cases

If a case is not found based on the user's search criteria, the system will display a NOT FOUND message. If you attempt to search on an individual case to which you do not have access (i.e., your ID is not associated to the case), the system will present a message stating that you are not authorized to access the case.

Case Control Number:

Health Insurance Claim Number (HICN): OR SSN:

Case Creation Date Range:
 From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

Case Submission Date Range:
 From Date: / / (MM/DD/CCYY) To Date: / / (MM/DD/CCYY)

QUICK HELP
[Help About This Page](#)

Slide notes

You may apply additional search filters to limit the number of cases displayed such as case creation date ranges (for Work-In-Progress cases) or case submission date ranges (for submitted cases).

A search for a maximum date range of 6 months at a time can be performed. There are no restrictions regarding the viewing of closed cases (as long as your user's ID is associated with the case). If a case is not found based on your search criteria, the system will display a NOT FOUND message.

If you attempt to search on an individual case to which you do not have access (i.e., your ID is not associated to the case), the system will present a message stating that you are not authorized to access the case.

Note: The system validates each data-entry field for accuracy and completeness. If errors are found, the system will display applicable error messages on the screen indicating what error condition(s) were found.

When errors are discovered, the cursor shall be placed on the first field that generates an error condition. You must correct the error before the system will allow you to proceed.

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Case Listing

This page lists all cases entered into the Workers' Compensation Set-Aside Web Portal that are associated with your login ID. Click on the Case Number to view the details of the case. Selecting 'Case Status' will return you to the Home page.

Case Number	Claimant Name	Date of Injury	Case Status	Case Location	Creation Date	Submission Date	Case Access
123456	LAST, FIRST						
987654	LAST, FIRST						
798654	LAST, FIRST						

[Previous](#) [Cancel](#)

- WIP (Work-in-Progress, case has been saved, but not yet submitted)
- Submitted (case has been submitted)
- PEND (case is pending)
- RECD (case has been received)
- REOP (case has been re-opened, after Regional Office (RO) has closed it)
- CLTR (closeout)
- ASGN (assigned)
- BUND (beneficiary under threshold)
- CLOS (case has been manually closed)
- COMP (case completed)

Slide notes

When you click on the Search button on the Case Look Up screen, the Case Listing page will display. This list will show all cases that met your search criterion, which are associated to your ID.

This page provides a summarized view of the case details, including: Case Number, Claimant Name, Date of Injury, Case Status, Case Location, Creation Date, Submission Date, and Case Access.

The Case Number is the Case Control Number which is assigned by the system. The Claimant is the name of the individual for whom the WCMSA has been submitted.

Date of Injury is the date of the work related injury or disease. Case Status is the current status of the case. It may be any of the following:

WIP (Work-in-Progress, case has been saved, but not yet submitted), Submitted (case has been submitted), PEND (case is pending),

RECD (case has been received), REOP (case has been re-opened, after Regional Office (RO) has closed it), CLTR (closeout), ASGN (assigned), BUND (beneficiary under threshold),

CLOS (case has been manually closed), COMP (case completed), DECD (beneficiary has been flagged as deceased), DENY (case denied, unable to process case),

DEVP (in development), DISP (Workers' Compensation Recovery Contractor (WCRC) recommendation completed at RO), DREC (development received),

OPCM (case reopened after RO has completed the case), RTND (under threshold, non-beneficiary case, no CMS review), ZERO (zero set-aside),

APPR (approved). Note: A case status of "Approved" means that the RO has approved and is working the case; an Approval letter may not have been generated yet.

Once the RO has completed their review of the case, the user will receive an e-mail alert notification and they can go to the Alerts listing page and retrieve the approval letter.

Case Location is the current location of the case. This may be Submitter, WCRC, or RO, Creation Date is the initial date the case was saved as a work-in-progress,

Submission Date is the date the WCMSA case was successfully submitted, and Case Access allows Account Managers to manage access to the case by granting or revoking access for all active Account Designees under the given WCMSAP account.

To view the Case Summary for a case, click a case number link.

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CMS Workers' Compensation Set-Aside Web Portal

Home About This Site CMS Links How To... Reference Materials Contact Us Logoff

Case Summary [Print this page](#)

Beneficiary/Claimant * Diagnosis Codes * WC Carrier * Employer* Attorney Notes Documents * Summary

Summary Information

Please review your case information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the "Submit Case" button to submit the case. Click 'Cancel Case Creation' to cancel the process, all data will be lost. Click "Save Work-In-Progress" button to save entered data. Print this page for your records.

If you would like to request a CMS Re-Review of this case, please the Request Case Re-Review button. [Request Case Re-Review](#)

[View Alerts](#)

Case Number: 123456

Slide notes


The system will display the Case Summary page for the selected case. From this screen, you can access specific information related to the case using the tabs on the screen or by clicking on the View button for the page you wish to view.

The Beneficiary/Claimant, Diagnosis Codes, Workers' Compensation (WC) Carrier, Employer, and Documents tabs are denoted with an asterisk which means data is required upon case submission for those pages.

When you access those pages, the specific required data elements will be denoted by an asterisk. For more information on these tabs, please see the Case Submission CBT. The Attorney and Notes screens do not include any required data elements.


For more information on how to upload or replace documentation for a case, please see the Uploading and Appending CBT.

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CMS Workers' Compensation Set-Aside Web Portal 

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Case Summary

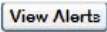
 [Print this page](#)

Beneficiary/Claimant * Diagnosis Codes * WC Carrier * Employer * Attorney Notes Documents * Summary

Summary Information

Please review your case information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the "Submit Case" button to submit the case. Click 'Cancel Case Creation' to cancel the process, all data will be lost. Click "Save Work-In-Progress" button to save entered data. Print this page for your records.

If you would like to request a CMS Re-Review of this case, please the Request Case Re-Review button. 



Case Number: 123456

Slide notes

If you disagree with the RO's decision on a WCMSAP submitted case, you may submit a request to CMS to re-review the case.

A WCMSAP case is eligible for re-review when it is in approved status and a re-review has not already been requested.

Note: The [Request Case Re-Review] button will be disabled if the case is not eligible for the re-review request.

To request a re-review of a case, click the [Request Case Re-Review] button.

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The screenshot shows the 'Case Re-Review Request' page of the CMS Workers' Compensation Set-Aside Web Portal. The page has a blue header with the CMS logo and navigation links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled 'Case Re-Review Request' and contains the following fields and options:

- Case Number:** 234576
- Please choose one of the following as your re-review request type:**
 - ☐ Medical
 - ☐ Rx
 - ☐ Both
- Please choose one of the following reasons for the re-review request. If option 2 is chosen, you must upload supporting documentation.**
 - ☐ Option 1) You believe CMS' determination contains obvious mistakes (e.g., a mathematical error or failure to recognize medical records already submitted showing a surgery, priced by CMS, that has already occurred).
 - ☐ Option 2) You believe you have additional evidence, not previously considered by CMS, which was dated prior to the submission date of the original proposal which warrants a change in CMS determination.
- Please enter any additional notes in the area provided below.** Notes are limited to 500 characters.
 - Text area containing: Please re-review this case using the additional medical records provided.
- Supporting documentation upload:**
 - Link: [Upload Documentation](#)
 - Text: Supporting documentation uploaded: Medical Records.pdf [Delete](#)
- Buttons:** Previous, Continue, Cancel

Slide notes

The Case Re-Review Request page will display. The case number associated to the case being submitted for re-review is shown at the top of the page.

Select the request type: Medical, Rx (Pharmacy) or Both (Medical and Pharmacy). Next select the reason for the request: Option 1 or Option 2.

If you believe CMS's determination contains obvious mistakes (e.g., a mathematical error or failure to recognize Medical records already submitted

showing a surgery, priced by CMS, that has already occurred), select Option 1 and then upload supporting documentation and/or submit comments in the Additional Notes field.

Click the [Continue] button. However, if you believe you have additional evidence, not previously considered by CMS,

which was dated prior to the submission date of the original proposal which warrants a change in CMS's determination, select Option 2

and then upload your supporting documentation. Note: If you have selected Option 2, you are required to upload supporting documentation. Click the [Continue] button.

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The screenshot displays the CMS Workers' Compensation Set-Aside Web Portal. The header includes the CMS logo, the portal title, and a COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled "Case Re-Review Request Verification". It shows a "Case Number: 234576". A paragraph of instructions follows, advising the user to review the request and click "Continue" to submit, "Previous" to edit, or "Cancel" to return to the home page. Below this, the "Reason for Re-Review request:" is listed as "Medical". An "Additional notes:" section contains the text "Please re-review the case using the additional medical records provided." The "Documentation uploaded:" section lists "Medical Records.pdf". At the bottom, there are three buttons: "Previous", "Continue" (highlighted with a yellow box and a mouse cursor), and "Cancel".

Slide notes

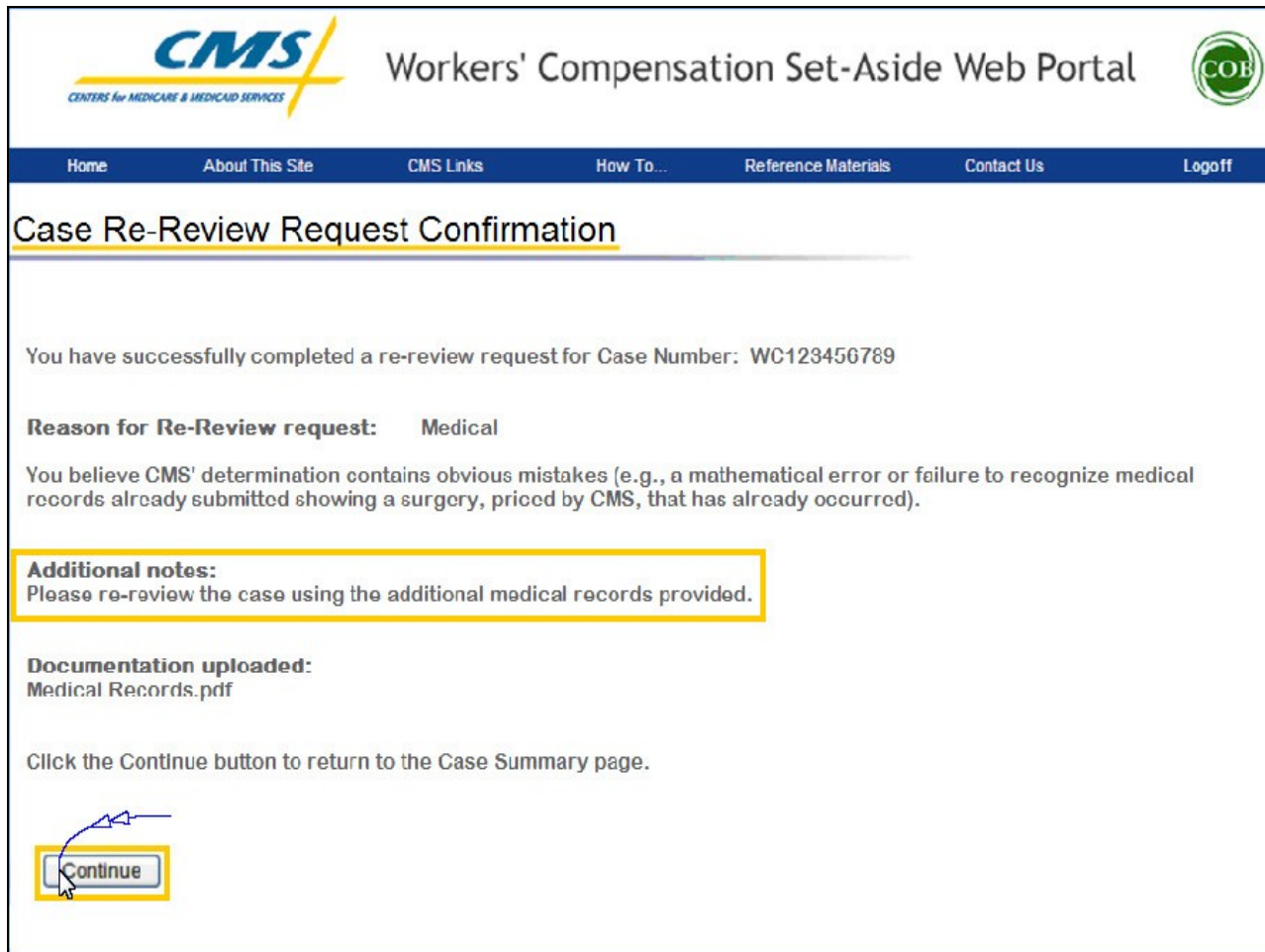
The Case Re-Review Request Verification page displays after Option 1 or Option 2 has been selected.

Verify that the information provided is accurate. Click [Previous] to make changes.

If you wish to cancel the re-review request, click [Cancel]. All information for the Re-Review Request is discarded.

To proceed with the re-review request, click [Continue].

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The screenshot displays the CMS Workers' Compensation Set-Aside Web Portal. The header includes the CMS logo (Centers for Medicare & Medicaid Services) and the COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. The main content area is titled "Case Re-Review Request Confirmation". It states: "You have successfully completed a re-review request for Case Number: WC123456789". Below this, it says "Reason for Re-Review request: Medical". A paragraph explains: "You believe CMS' determination contains obvious mistakes (e.g., a mathematical error or failure to recognize medical records already submitted showing a surgery, priced by CMS, that has already occurred)." A yellow-bordered box contains "Additional notes:" followed by "Please re-review the case using the additional medical records provided." Below this, it says "Documentation uploaded: Medical Records.pdf". A message instructs: "Click the Continue button to return to the Case Summary page." At the bottom, there is a "Continue" button with a yellow border and a blue arrow pointing to it from the left.

Slide notes

The Case Re-Review Request Confirmation page displays. This page confirms that your re-review request has been submitted.

If you entered free-form text, it will be added to the permanent case and the case will be submitted for consideration. Click [Continue] to return to the Case Summary page.

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Next Steps

Case is placed in DREC status

When the re-review process is complete, an e-mail Alert (Approval Letter) will be sent to the e-mail address provided during account setup

Slide notes

When a re-review request has been submitted, the case is placed in DREC status indicating to the RO that documentation has been received on the case.

(Note: Case Status can be viewed on the Case Listing page).

The file name for each document that has been attached to the re-review request is displayed on the WCMSAP Case Document and Case Summary pages.

When the re-review process is complete, an e-mail Alert (Approval Letter) will be sent to the e-mail address provided during account setup.

The Alert (Approval Letter) will include the completed Re-Review Request attachment with the RO determination.

You can view the Alert by clicking the [View Alerts] link on the WCMSAP Home page or by going to the Case Summary page.


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The screenshot displays the CMS Workers' Compensation Set-Aside Web Portal. At the top left is the CMS logo with the text "CENTERS for MEDIGARE & MEDICAID SERVICES". To its right is the portal title "Workers' Compensation Set-Aside Web Portal" and a COB logo. A navigation bar contains links: Home, About This Site, CMS Links, How To..., Reference Materials, Contact Us, and Logoff. Below this is the "Case Summary" section with a "Print this page" link. A tabbed interface shows "Beneficiary/Claimant*", "Diagnosis Codes*", "WC Carrier*", "Employer*", "Attorney", "Notes", "Documents*", and "Summary" (which is selected). The "Summary Information" section contains instructions: "Please review your case information. If you need to change the information, click the 'Edit' button. If you are satisfied with the information click the 'Submit Case' button to submit the case. Click 'Cancel Case Creation' to cancel the process, all data will be lost. Click 'Save Work-In-Progress' button to save entered data. Print this page for your records." Below the instructions is a "Request Case Re-Review" button. A "View Alerts" button is highlighted with a yellow box. A blue arrow points from the "View Alerts" button down to the text "Case Number: 123456".

Slide notes

From the Case Summary page, you can view any Alerts that have been received for the case by clicking the [View Alerts] button.

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**Workers' Compensation Medicare Set-Aside Web Portal**

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Alert Listing

Case Number: #####

This page lists all the alerts for the selected case. The data is sorted by Alert Creation Date (descending).

Alert ID	Alert Creation Date	Alert Type	Creator	Status	HICN/SSN	Bene Name
127	01/31/2011	Under Threshold	WCSA	READ	#####A	FIRST LAST
125	01/31/2011	Denied	WCSA	READ	#####B	FIRST LAST

[Previous](#)

Instead of the hardcopy letters currently generated in the Workers' Compensation Case Control System (WCCCS), the WCMSAP will generate e-mail alerts to the case submitter. The system will automatically display all alerts/notifications associated with a case in descending date order, but you can re-sort the case in ascending order, by case, by date, by date within a case; and by case within dates. For more information on Alerts, please see the Alerts CBT.

Slide notes

Instead of the hardcopy letters currently generated in the Workers' Compensation Case Control System (WCCCS), the WCMSAP will generate e-mail alerts to the case submitter.

The system will automatically display all alerts/notifications associated with a case in descending date order, but you can re-sort the case in ascending order, by case, by date, by date within a case; and by case within dates.

For more information on Alerts, please see the Alerts CBT.

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CENTERS FOR MEDICARE & MEDICAID SERVICES

Workers' Compensation Set-Aside Web Portal

Home About Logoff

Case Listing

Account Managers for Corporate and Representative accounts can grant or revoke Account Designees' access to specific cases under an Account ID. Please note: This option is only available to Account Managers. To grant or revoke access, the Account Manager can click the Manage Access link on the Case Listing screen

This page lists all cases entered into the Workers' Compensation Medicare Set-Aside Web Portal that are associated with your Login ID. Click on the Case Number to view the details of the case. Selecting 'Cancel' will return you to the Home page.

Case Number	Claimant Name	Date of Injury	Case Status	Case Location	Creation Date	Submission Date	Case Access
123456	LAST, FIRST	#### ##-##	DREC	WCRC	2010-02-15	2010-02-23	Manage Access
987654	LAST, FIRST	#### ##-##	WIP	Submitter	2010-01-24		Manage Access
798654	LAST, FIRST	#### ##-##	DREC	WCRC	2009-11-27	2009-12-05	Manage Access

[Previous](#) [Cancel](#)

Slide notes

Account Managers for Corporate and Representative accounts can grant or revoke Account Designees' access to specific cases under an Account ID.

Please note: This option is only available to Account Managers. To grant or revoke access, the Account Manager can click the Manage Access link on the Case Listing screen.

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CMS Workers' Compensation Set-Aside Web Portal

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Manage Case Access

Case Information

Case Number:
First Name:
Last Name:
Date of Injury:
Case Status:
Case Location:
HICN:
SSN:
Create Date:
Submission Date:

Once the Manage Access link/button is clicked, the Manage Case Access page will display all Account Designees assigned to the Account ID. If the Account Designee currently has access to the selected case, the checkbox will be checked. If the Account Designee does not currently have access to the case, the checkbox will be empty. To revoke access to a case, remove the check. To grant access, place a check in the box. Place a check in the Select All box to grant access to all Account Designees. Check the box again to revoke access from all Account Designees. After all changes are complete, click Continue.

Designee associations for the case:

You may select a designee by checking the checkbox next to their name. To select all Designees, click the Select All checkbox.

Designee Name	Grant/Revoke Access
FIRST LAST	<input checked="" type="checkbox"/>
FIRST LAST	<input checked="" type="checkbox"/>
FIRST LAST	<input type="checkbox"/>
	<input type="checkbox"/> Select All

Continue Cancel

Slide notes

Once the Manage Access link/button is clicked, the Manage Case Access page will display all Account Designees assigned to the Account ID.

If the Account Designee currently has access to the selected case, the checkbox will be checked. If the Account Designee does not currently have access to the case, the checkbox will be empty.

To revoke access to a case, remove the check. To grant access, place a check in the box. Place a check in the Select All box to grant access to all Account Designees. Check the box again to revoke access from all Account Designees. After all changes are complete, click Continue.

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The following Designees have access to the case:

Designee Name
FIRST LAST
FIRST LAST
FIRST LAST



Case Listing

The Case Access Confirmation page will display, listing only the Account Designees with access granted to the case.

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The Case Access Confirmation page will display, listing only the Account Designees with access granted to the case.

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**Workers' Compensation Set-Aside Web Portal**

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Manage Case Access

Case Information

Case Number: 123456
First Name: FIRST
Last Name: LAST
Date of Injury: ####/####
Case Status: Submitted
Case Location: WCRC
HICN: #####A
SSN: ###-##-####
Create Date: 02/15/2010
Submission Date: 02/23/2010

Designee associations for the case:
You may select a designee by checking the checkbox next to their name. To select all Designees, click the Select All checkbox.

Designee Name	Grant/Revoke Access
FIRST LAST	<input checked="" type="checkbox"/>
FIRST LAST	<input checked="" type="checkbox"/>
FIRST LAST	<input type="checkbox"/>
<input type="checkbox"/> Select All	

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To exit the case, click Log Off. The system will return you to the Login Warning page.

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You have completed the WCMSAP Case Lookup course.
The information in this course can be referenced by using
the document at the link below:

[https://www.cob.cms.hhs.gov/WCMSA/help/userManual/
WCMSAUserManual.pdf](https://www.cob.cms.hhs.gov/WCMSA/help/userManual/WCMSAUserManual.pdf)

Slide notes